EXIM Online (EOL) Essentials:

An Introductory Guide for Exporters

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September 2017

Welcome to EXIM Online (EOL)

This document will help you to get started using our online application and policy management system. Basic tasks will be explained step-by-step, including creating a new EOL account, assigning a broker to your account and to an application, and where to get assistance.

What products are used on EOL?

- Multi-buyer insurance policies for exporters
  - ➢ Express Insurance
  - ➢ Small Business Multi-buyer (ENB)
  - ➢ Small Business Environmental (ENV)
  - ➢ Standard Multi-buyer (ESC)
- Exporter Single Buyer (ESS)
- Financial Institution Buyer Credit (FIBC)
- Bank Letter of Credit (ELC)
- Medium- term insurance
- Medium-term Bank Guarantee

What tasks can be performed on EOL?

- Exporter can assign a broker to their EOL account and a specific application
- Exporter/broker can complete an application for a new policy, or a Special Buyer Credit Limit (SBCL)
- View status of pending applications submitted to EXIM
- Accept a quote
- Pay premium
- View and print in-force policies and policy documentation
- Report shipments and overdues
- Broker can view all policies
- File a claim

Best practices when using EOL

- We strongly advise against sharing and letting others use your User ID and password
  - ➢ EOL assumes the person entering information is the person to whom that User ID and password were issued
  - ➢ Sharing ID's and passwords can create confusion if there is a need to reconstruct somebody's activity in EOL

- EOL accounts cannot be deleted, but they can be deactivated to prevent someone from using them. They can also be reactivated if necessary. In both cases, the primary contact for the exporter should email BAPIMT@exim.gov with the appropriate request.
- If you have assigned your broker to your account in EOL (see instructions below), they will be able to access your information and help you manage your EOL account and complete applications

Where can I find EOL?

EOL is accessed via EXIM Bank's website www.exim.gov using the "Tools for Exporters" tab, or at https://eximonline.exim.gov.
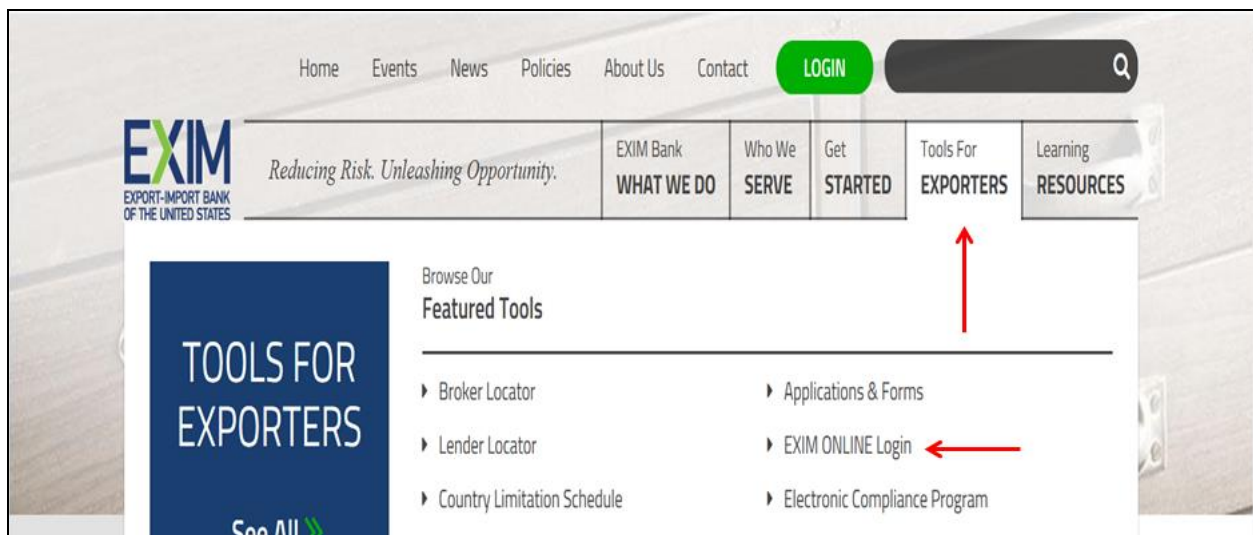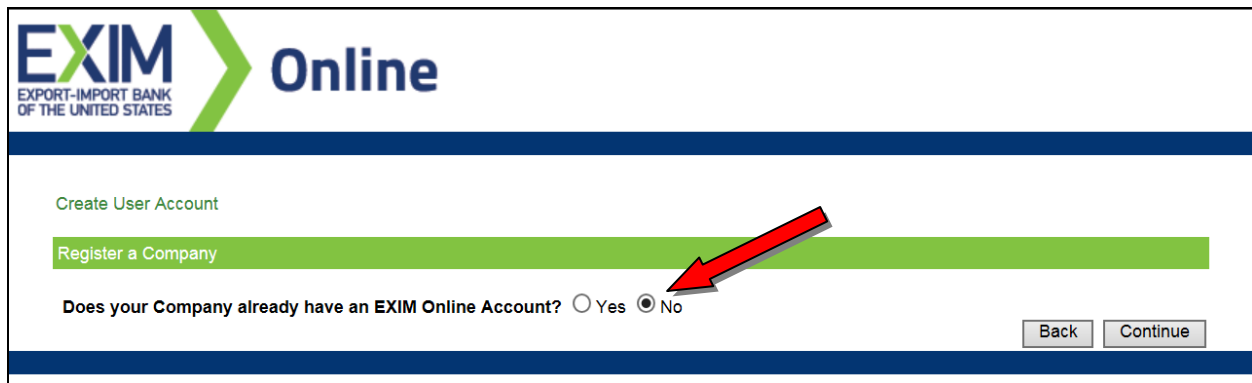
How do I get an EOL account?

1. To open an EOL account, find the EXIM Online link on EXIM's webpage (see above) and click on "Register for a user account", after which you will be prompted to accept the terms of use. <u>You will need your company's DUNS number and primary NAICS code.</u>
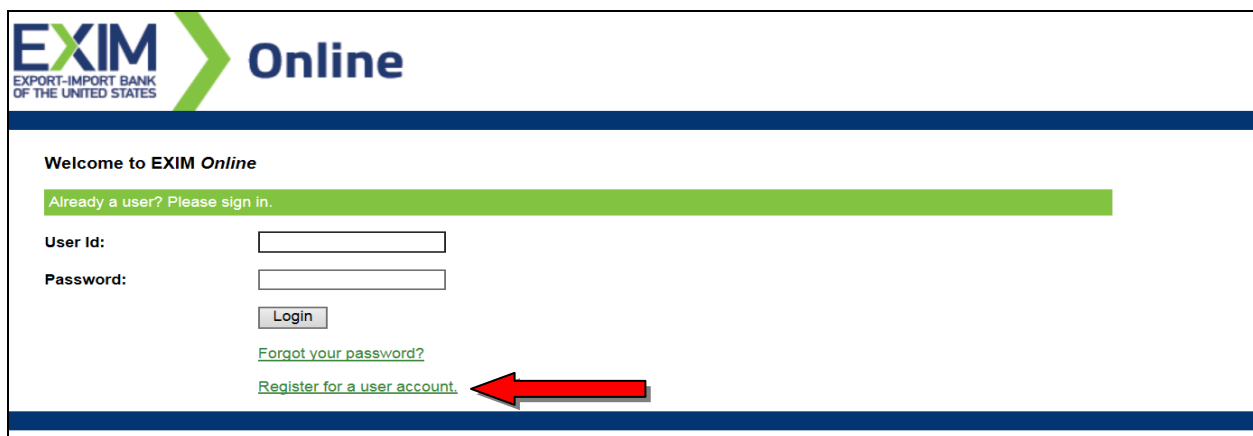
2. If your company is new to EOL, answer "No" to the question "Does your Company already have an EXIM Online Account?"
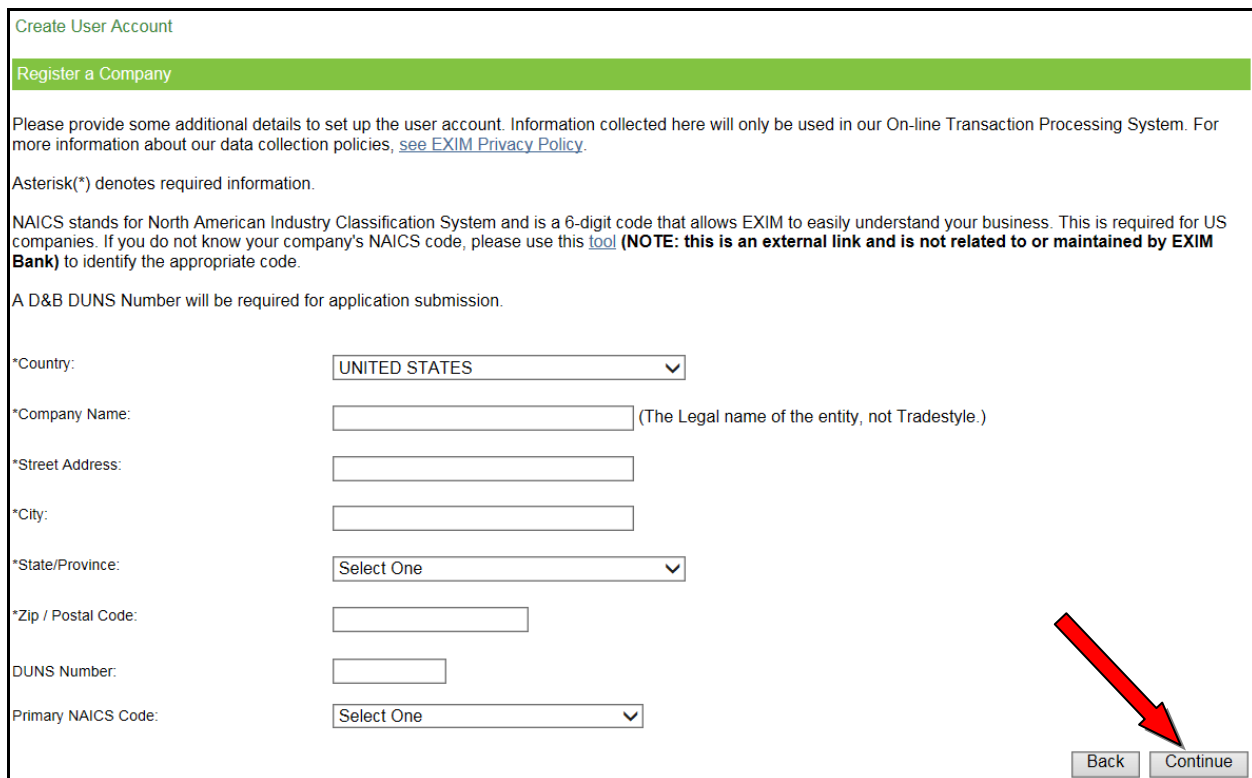
3. Complete the details for your EOL profile and click "Continue".

4. You will then be prompted to enter contact details, and select a user ID, password, and challenge question. Then press "Continue". This person will be the "Primary Contact" for your company for all general correspondence. Your company can change the primary contact by calling the Credit Applications & Processing Division at (202) 565-3800. <u>Do not use your broker's contact details</u>.

Enter User Information

Provide some additional details to set up the user account. Please note that the information collected here will only be used in our On-line Transaction Processing System. For more information about our data collection policies, see EXIM Privacy Policy.

Note: Asterisk(*) denotes required information.

*User Id:

User ID can only contain characters from the following four groups:
- o English uppercase characters (A through Z)
- o English lowercase characters (a through z)
- o Numerals (0 through 9)
- o Non-alphabetic characters: hyphen (-), period (.) and underscore (_)

*Password:
*Re-enter Password:

Password should conform to the below guidelines:
- Must be at least 8 characters long.
- Must contain at least 1 character from each of the following four character groups:
  - o English uppercase characters (A through Z)
  - o English lowercase characters (a through z)
  - o Numerals (0 through 9)
  - o Non-alphabetic characters (such as ~, !, @, #, $, %, ^, &, *, (,), -, _, +, =, {, }, [,], |, ;, :, <, >, /, ?)
- Must not contain spaces.
- Must not be the same as the User ID.

*First Name:

*Last Name:

*Title:

*Phone:

*Email:

*Challenge Question: Select One

Please select a "challenge" question and response and we'll use this to verify your identity when you call in to EXIM offices for your password.

*Challenge Response:

Remember to always protect your userid and password from unauthorized use.

Back   Continue

5. You will then receive a confirmation indicating that the user account was created and that a confirmation email has been sent.   Record your User ID and password in a safe location. You may then proceed to log in to the new account.

EXIM Online
EXPORT-IMPORT BANK OF THE UNITED STATES

Create User Account

User Profile Confirmation

The User Account was created successfully. A confirmation email has been sent to the email address provided while registering the account. You may Login with the new User ID or go to the main EXIM website.
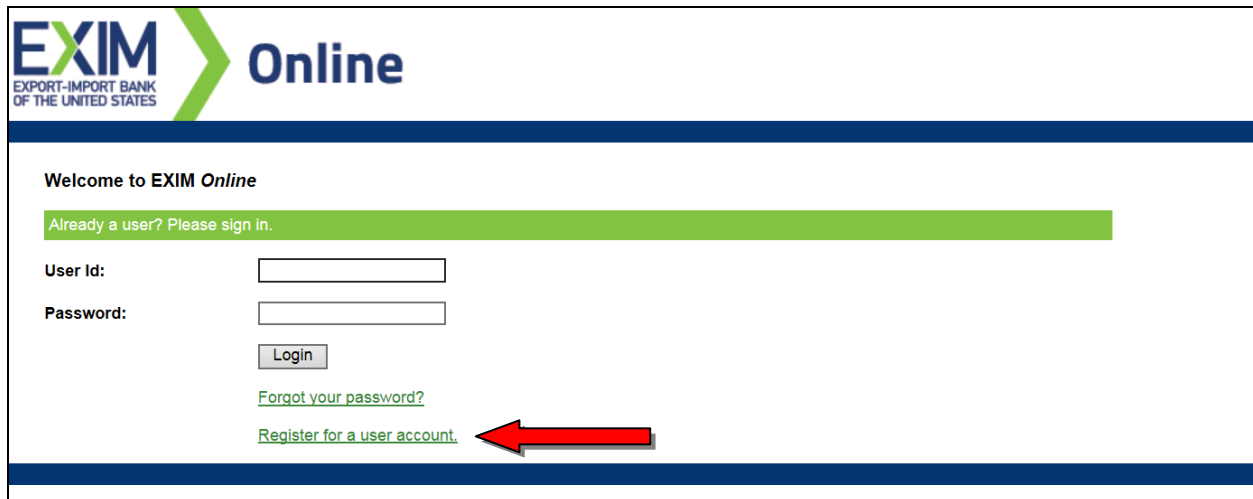
Creating additional exporter user accounts

Additional user accounts for your company can be created so multiple people can access EOL. Those additional users will need your company's registration number, which was created when your company first set up an account in EOL. The person designated by your company as its "Primary Contact" can find the registration number in his/her EOL account under the "My
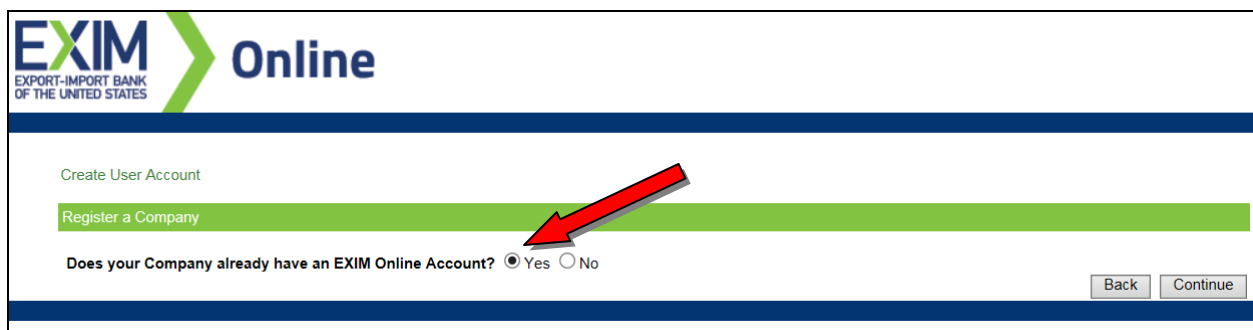
Company Profile" link on your company's landing page. Record the registration number and keep it in a safe location in case you get locked out of your EOL account or need to re-set your password.
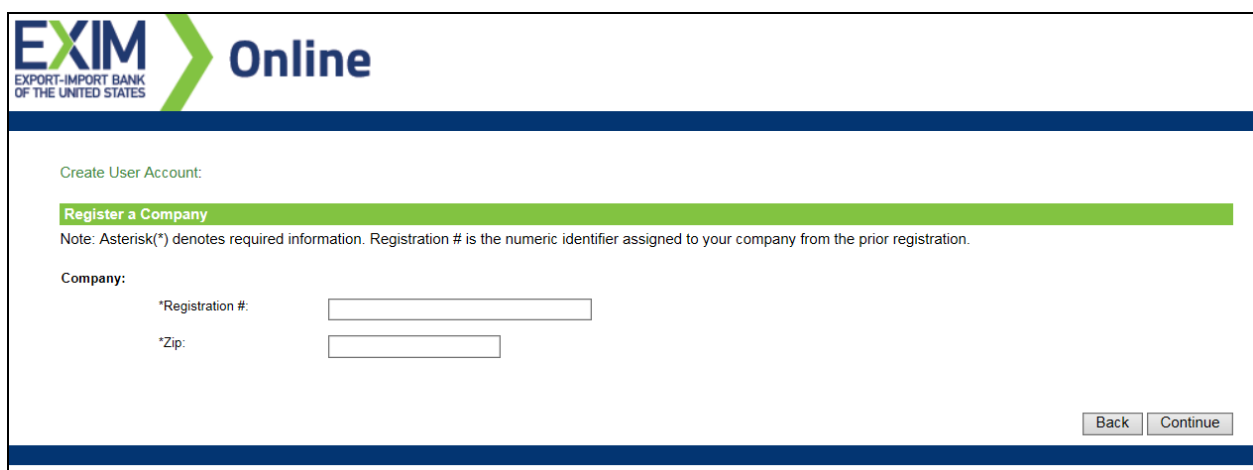
1. To set up additional users, click on the "Register for a user account" link after which you will be prompted to accept the terms of use.

2. Since your company already has an EOL account, you should answer "Yes" to the question "Does your Company already have an EXIM Online Account?"
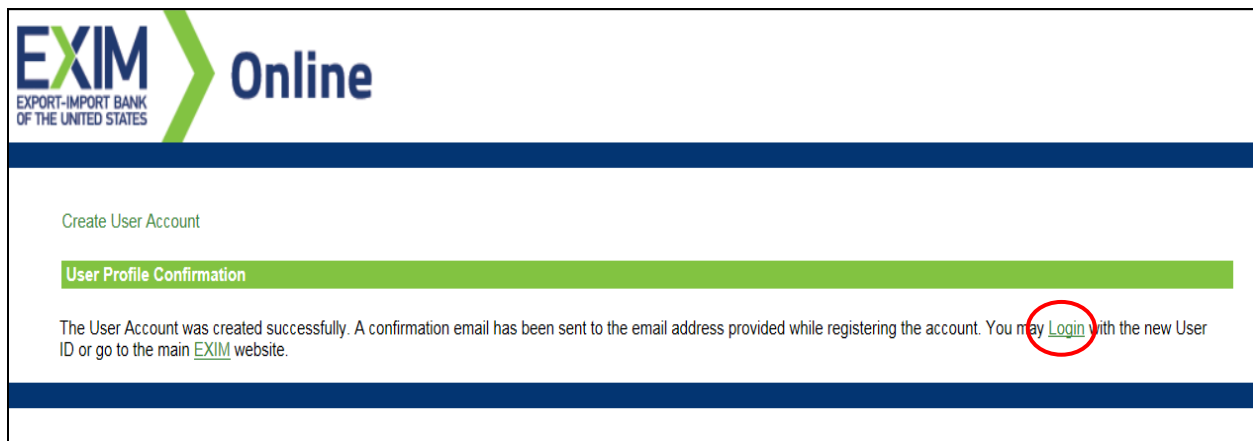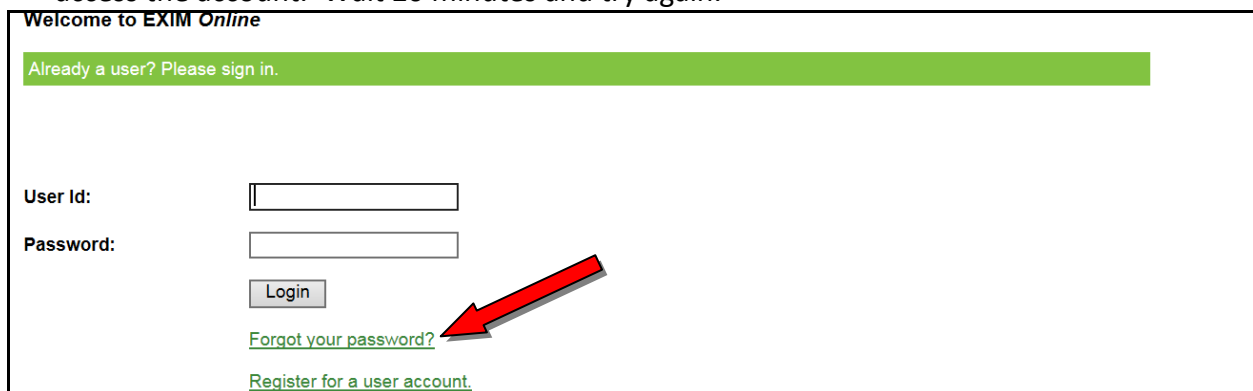

3. Enter your company's registration number and zip code.

4. You will then be prompted to enter contact details, and select a User ID, password, and challenge question as per the previous instructions. Then press "Continue". You will receive a confirmation that the user account was created and that a confirmation email has been sent. You may then proceed to log in to the new account.

What if I forget my User ID or password, or get locked out of my account?

1. If you forget your User ID, send an email to BAPIMT@exim.gov with your name, your company's name, and your email address and ask to have your User ID emailed to you.

2. If you forget your password, from the log-in page, click on the link "Forgot your password?" Enter your User ID and email address to receive an email with a link to re-set your password. Before you can re-set your password, you will be asked to answer the challenge question you established when you first created your account.   If you cannot answer your challenge question, send an email to BAPIMT@exim.gov.

3. NOTE: You will be temporarily locked out of your account after three failed attempts to access the account. Wait 20 minutes and try again.

Appointing a broker to your account

Before a broker can assist you with an application in EOL, you need to appoint the broker to your account. This can be done in two ways. The first way is for your company to make a

general appointment of the broker as discussed below in this section. The second way is for your company to appoint the broker to a specific application as discussed in the next section.

1. From your landing page click on the "Maintain Broker" link.

2. Open the drop-down box and select your broker from the list, and click on "Add Broker". The broker will now appear on the list of brokers already associated with your EOL account (if any). The broker will now be able to initiate applications for you in EOL. You can view and remove a broker by clicking on the appropriate links.

Associating a broker with a specific insurance application

The second way to appoint a broker to your account is by associating them with a specific application for insurance.

1. Initiate the application from your landing page by clicking on "Apply for Insurance Policy or Medium-term Guarantee".

Act / Manage Transactions	Monitor Portfolio
Act	**My Portfolio**
Apply for a Letter of Interest	Pending Applications
Apply for Insurance Policy or Medium-term Guarantee ⟵	Pending Claims
Act on Quote	Insurance In Force/Recently Expired Policies
Apply for Special Buyer Credit Limit (SBCL)	Insurance Policy Assignments
Apply for Issuing Bank Credit Limit (IBCL)	Authorized + Non-Operative Guarantees
Continue a Saved Application	Operative Guarantees
Continue a Saved Claim	Search Portfolio
Manage	**Miscellaneous**
Amend a Policy or Guarantee	Historical Transactions
Assign Insurance Policy Proceeds	My Company Profile
Report Shipments	Maintain Broker
Make A Payment	
Report Overdues	
File a Claim	
Request a Disbursement Approval	
Maintain Letters of Interest	

2. Select the type of policy from the drop-down menu and click "Continue". This will take you to the instructions page for the application.

3. The location of the link to appoint a broker for the application depends on the type of policy.

For Express Insurance:

a) Select "Short-Term Multi-Buyer Insurance" as above and then "Start Express Application".

b) To access the link to assign a broker, click either "Continue" or the "Company Info" link.

c) Select the broker from the drop-down list of all registered brokers, and click "Save and Exit". That broker is now associated with your company's account, and will have access to the application in EOL. Note that you will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. Do not select either of these unless you want the organization to have access to your application. They can be added later.

Application Primary Contact: The individual responsible for all correspondence specifically related to this transaction. You can choose from the existing contacts already on file (if any) OR add a new contact by picking the "Add New Contact" option.

Contacts on file:

| Mr. John Smith - (123) 456-7890 | ⌄ |

*Prefix	⦿ Mr. ◯ Mrs. ◯ Ms.
*First /Last Name:	John / Smith
*Title:	President
*Email:	john.smith@littlebrother.com
*Phone / Fax (optional):	(123) 456-7890 /

Broker: Please select a broker if you are working with an insurance brokerage. Broker will have full access rights (view and enter data) to this application.

| -Please select- | ⌄ |

Do not select either of these unless you want the organization to have access to your application. You may want to use this option if you assign your policy proceeds to a financial institution.

Financial Institution: Please select a Financial Institution (view access only)

| -Please Select- | ⌄ |

City/State: Please select an EXIM Bank export promotion City/State Partner(view access only)

| -Please Select- | ⌄ |

[Save & Exit] [Continue]

For other Multi-Buyer (ENB), Single Buyer (ESS), Financial Institution Buyer Credit (FIBC), and Medium-Term policies:

a) After selecting one of the policy types as shown earlier, select the "Access Rights" link.

	Home	Customer Service

Exporter:
Test Exporter - 477 Testing

Multibuyer Insurance Application
OMB No. 3048-0023, EIB 92-50, Expires 06/30/2019

Tracking #: 664219

Introduction   *Need help?*

Done	App. Section
▶✓	Instructions
	Company Info.
	Access Rights
	General Questions
	Products
	Export Portfolio
	Affiliates
	Export Credit Experience
	Financial Statements
	Decision Makers
	Export Receivables
	Overdue Receivables
	Exclusions
	Special Coverages
	Comments
	Attachments
	Application Summary
	Submit

To complete this application you will need your:

    1) Most recent fiscal year financial statements.
    2) Total export credit sales and write-offs for the last three years.
    3) Accounts receivable aging, dated within 30 days of the application date.

*** **Important** *** - The Borrower, Guarantor, Buyer and End User must be foreign entities in countries for which EXIM is able to provide support, see EXIM's Country Limitation Schedule.

Please use the **Right Navigation Area** to easily move to specific sections of this application. Just point and click on the section you wish to access. When each section is marked with a "√" you may **Submit** the application for processing.

At any time during the application process, you may click on the **"Save and Exit"** button to save the information you have entered and exit the On-line Transaction Processing System. Log back in any time to enter more information and/or submit the completed application.

This system will also allow you to **Upload** copies of credit information you wish to include in your application as well as **Print** a copy of the application for your records by clicking on the **"Application Summary"** link at the top of the page.

Decisions: Upon submission, a tracking number will be provided allowing you to track the application's progress.

TO START: Click on "Continue" below

For **Help, contact** your insurance broker -or- call 1-800-565-3946 (press#2 at the greeting) to be connected to your nearest EXIM Bank Regional Office.

If this application has not been submitted within 90 days of its initiation it will be removed from the system.

[Back] [Continue]

b) Select the broker from the drop-down list of all registered brokers, and click "Save and Exit". That broker is now associated with your company's account, and will now have access to the application in EOL. Note that you will be offered the option of granting a financial institution and/or a City/State Partner (now called a Regional Export Promotion Program (REPP) participant) view-only access to the application. Do not select either of

these unless you want the organization to have access to your application.   They can be added later.

Exporter landing page

The first screen that you will see after logging on to EOL is your landing page. It is divided into four sections grouped by related functionalities as described below. The "Registered Users" link under Miscellaneous will only appear if the user is the designated Primary Contact for the company. Only the Primary Contact may view a list of all registered EOL users with that company. The Primary Contact will be notified when a new user has been registered.

Adding or changing a broker on an existing policy

You can add a broker to an existing policy if you were not using one at the time a policy was issued. You can also change a broker after a policy is issued, in which case the existing broker will receive a communication informing them of the change. A policy must be amended to add or change a broker.

1. From the landing page, click "Amend a Policy or Guarantee".

2. Select the policy you want to amend.

3. Click "Broker" among the amendment options on the right hand side of the screen.

4. Select the new broker from the dropdown list of brokers already associated with your company, or from the drop-down list of all EXIM registered brokers. You can review the change before submitting it by clicking "Application Summary". You may also add any comments by clicking "Comments". When you are finished, click "Submit".

5. Confirm your request by clicking "Submit".

6. Confirmation of the request will appear with a tracking number. You can print this page.

Where to find help while using EOL

The "Customer Service" button on the top right of the landing page provides access to comprehensive instructions on how to use all aspects of EOL. Click on the links on the left side of the page to open the associated content, which will appear on the right side of the page. There are also links to Frequently Asked Questions, and an opportunity to provide feedback on your EOL experience. The "Contact Us" section is used only to provide general feedback to EXIM Bank. DO NOT use this section to ask questions about the status of specific applications or policy related questions. Direct such questions to the appropriate loan officer.